

SELF-SERVICE CENTER

PROCEDURES: WHAT TO DO AFTER THE COURT HEARING CONSERVATORSHIP-OF AN ADULT

STEP 1 What to do after the hearing is over:

A. GO TO THE CLERK, PROBATE REGISTER. If the Judge/Commissioner grants the PETITION FOR APPOINTMENT OF A CONSERVATOR, you will need to take the **originals** of the following:

- THE ORDER OF APPOINTMENT OF A CONSERVATOR,
- THE LETTERS, **AND**
- THE ACCEPTANCE OF THE LETTERS.

When you take the documents listed above, the clerk will:

- Review the ORDER OF APPOINTMENT,
- Complete the LETTERS,
- Have you sign the ACCEPTANCE, **AND**
- File the originals.

Note: You should ask the Clerk to certify a copy of the LETTERS to prove that you have the appointment and authority from the court. There is an **\$18.00 certification fee plus \$0.50 per page** to do this.

B. BOND: If the Judge/Commissioner did not waive the bond and ordered that you post a bond for a certain amount, call bonding company, purchase the bond, and file the original bond with the court. **DO THIS IMMEDIATELY** after the order is signed, because no LETTERS will be issued without the bond.

C. LETTERS OF APPOINTMENT. Keep a **certified copy** of the LETTERS to show anyone who needs to know that you have authority from the court to act as conservator, and what that authority is.

D. ORDER OF APPOINTMENT. Keep a copy of this to remember what the Judge/Commissioner ordered you to do in this case.

E. ORDER TO CONSERVATORS. Keep a copy of this Order and read it often. This ORDER contains the general instructions about what you are required to do as conservator. Be sure you know your obligations, and what you are required to do under the law.

If for some reason the Court did not waive the bond and ordered you to post a bond and to file an ANNUAL ACCOUNTING, you are required to do the following:

A. INVENTORY AND APPRAISEMENT and PROOF OF MAILING

INVENTORY AND APPRAISEMENT: File this document no later than **90 days** after appointment, to list all the assets and debts of the protected person, and to show how you will care for the person's finances.

Note: Mail a copy to the protected person and to other interested persons.

B. ANNUAL ACCOUNTING and PETITION FOR APPROVAL OF ANNUAL ACCOUNTING: You must file these documents **every year on or before the anniversary date** of the ORDER OF APPOINTMENT AS CONSERVATOR.

Note: The Accounting must be approved by the Judge/Commissioner.

- When you want to be discharged as conservator, you must file a PETITION FOR APPROVAL and A FINAL ACCOUNTING. These forms are available at the Self-Service Center in the packet called ***Petition for Approval of Annual Accounting***.

C. PROOF OF RESTRICTED ACCOUNT: If the Judge ordered you to put some or all of the person's money into a restricted account, obey this Order right away. Then file the PROOF OF RESTRICTED ACCOUNT signed by the manager at the bank or financial institution that will show the account was properly established.

D. ESTATE MANAGEMENT PLAN: If you are required to file an ANNUAL ACCOUNTING AS CONSERVATOR, file the ESTATE MANAGEMENT PLAN **no later than 90** days after the court Order and every time you file an Accounting. Mail a copy to the person's attorney, too.

E. FEE STATEMENT: If you are charging a fee to be the conservator, or trustee, you must fill out the FEE STATEMENT and file it with the court..